

GELCO Travel Planner

ENGINEERING DIVISION

The GELCO Travel Manager replaces the former Legacy Travel System with an automated process that features:

- A single system for both foreign, domestic and local trips
- A completed travel authorization that will pre fill the expense voucher
- Automated per diem look-up
- Electronic routing of documents for approval
- Rapid payment processing (assuming no delays in approval, 2 days)

Documents to assist with the process:

LBNL Travel Manager “Quick Reference for Document Preparation”

ENG Division Travel Planner

ENG Division Travel Approval Matrix

LBNL Travel Manager “ Quick Reference for Approvers”

Online Resources:

Access to GELCO Travel Manager – <http://trvprd.lbl.gov/>

GELCO Travel Manager website- <http://travel.lbl.gov/TravelManager/index.htm>

GELCO Travel Hotline – <mailto:TravelHotLine@lbl.gov>

GELCO Travel Help – Ext. 4500

Travel Authority At-A-Glance

- Employees must obtain travel authorization prior to travel.
- All Requests must be approved electronically on GELCO by appropriate staff.
- For local and domestic travel authorization the following signatures are required
 - employee, supervisor, and finance manager.
- For foreign travel authorization the following signatures are required:
 - employee, supervisor, finance manager and division director or designee.

THE TRAVELER

Do-It- Yourself TRIP PLANNING

- 1) Obtain travel authorization prior to travel from PI/supervisor.
- 2) Using GELCO Travel Manager, create your own travel authorization, see pages 1-4, “Quick Reference for Document Preparation,” and route the TA for approval. NOTE: If you are using funds other than from Engineering for travel, he/she will need to select the appropriate approvers from lists provided by the respective division owning the project.
- 3) Schedule your own travel arrangements including flight reservations through Travel Power, Maritz or directly with the airline.
- 4) Maritz will email direct to the employee flight confirmation and send a PDF/ Invoice receipt for electronic check-in.

OR

Assisted TRIP PLANNING

- 1) Employee obtains travel authorization prior to travel from PI/supervisor.
- 2) Employee completes the Travel Planner document and submits to an ENG Division administrative assistant (arranger) who will process steps (identified in #2 & 3) on behalf of the employee.
- 3) Maritz will email, direct to the employee and arranger, flight confirmation and send a PDF/ Invoice receipt for electronic check-in.

Foreign Travel At-A-Glance

- Foreign travel authorization process includes approval from the Engineering Division Director.
- Foreign trip reports are due 30 days after travel is completed.
- LBNL will not reimburse the foreign travel voucher or allow subsequent foreign travel until the trip report is complete.

TRAVEL EXPENSE VOUCHER

Travel Expense Voucher At-A-Glance

- Travel Expense Vouchers must be approved and sent to the Travel Office within 30 days.
- Subsequent travel will not be approved if the employee has a delinquent voucher or has a trip report pending.
- For local and domestic travel authorization the following signatures are required:
 - The employee, supervisor, and finance manager.
- For foreign travel authorization the following signatures are required:
 - The employee, supervisor, finance manager and division director or designee.

Do-It- Yourself TRAVEL VOUCHER

- 1) Log onto GELCO Manager – <http://trvprd.lbl.gov/>
- 2) Enter your LDAP username and password (case sensitive).
- 3) If you are completing the travel expense voucher on your own, follow the directions on pages 5-7 in the **LBNL Travel Manager “Quick Reference for Document Preparation.”**
- 4) Create a travel voucher and enter the actual costs.
- 5) Refer to the **Engineering Division Travel Matrix** for approval routing or to the project’s home division approvers.
- 6) Separately submit a print-out of the expense list (under **PREVIEW DOCUMENTS**), attach your receipts and mail to the LBNL Travel Office, B937-500.

OR

Assisted TRAVEL VOUCHER

- 1) Submit receipts to an administrative assistant to create a travel voucher.
- 2) Traveler will be contacted by the administrative assistant when the voucher is ready for their signature.
- 3) Select **VOUCHER FROM AUTHORIZATION**, click your name, and scroll the list for the appropriate trip.
- 4) Traveler logs onto GELCO, choose **DOCUMENT PREPARATION**, then **OPEN EXISTING DOCUMENT**, then select the appropriate document from the list presented.
- 5) Traveler enters their signature PIN in the document (at the bottom of the page),
- 6) Click **STAMP AND ROUTE** – If the ‘stamp and route’ button is not displayed at the bottom of the screen and/or the document is ‘Edit Locked’, remove the ‘Edit Lock’, see page #3.
- 7) Create the document routing list according to the **Engineering Division Travel Matrix**.
- 8) The system may present an ‘audit screen’ which could indicate “FAIL” if the actuals were entered for lodging or M&IF. The “fail” notification is merely an alert.
- 9) **ACCEPT** the completed voucher to finish the process.

Corporate Card Use At-A-Glance

- Travel expenses charged to Corporate Card are reimbursed directly using GELCO.
- Corporate cards do not require a credit application and there is no card limit for travel expenses.
- Traveler is liable for the reconciliation of all charges to his/her corporate card by the statement due date.
- Corporate cardholders should review the LBNL policy in the RPM, Chapter 4.

THE APPROVER

- 1) GELCO Manager – <http://trvprd.lbl.gov/>
- 2) Please refer to pages 1-6 in the **LBNL Travel Manager “ Quick Reference for Document Approvals.”**
- 3) Logon using LDAP name and password (same as email). **ENTER PIN** – Enter your LDAP username and password (case sensitive).
- 4) Click **ROUTE AND REVIEW DOCUMENTS** from the menu and select the documents you wish to approve.
- 5) Click ‘stamp’ and enter your ‘signature PIN.’
- 6) Logout to finish the process.

Edit Lock At-A-Glance

- Go to the GELCO tool bar at the top of the page.
- Click on *SET UP*
- Click on *ADMIN*
- Click on *Remove Edit Locks*
- Click on the document name (in blue)
- The edit lock should be removed.